

Investment Portfolio Management

Build, track, and manage performance of your investment portfolios,
see the complete picture, and make better-informed decisions.

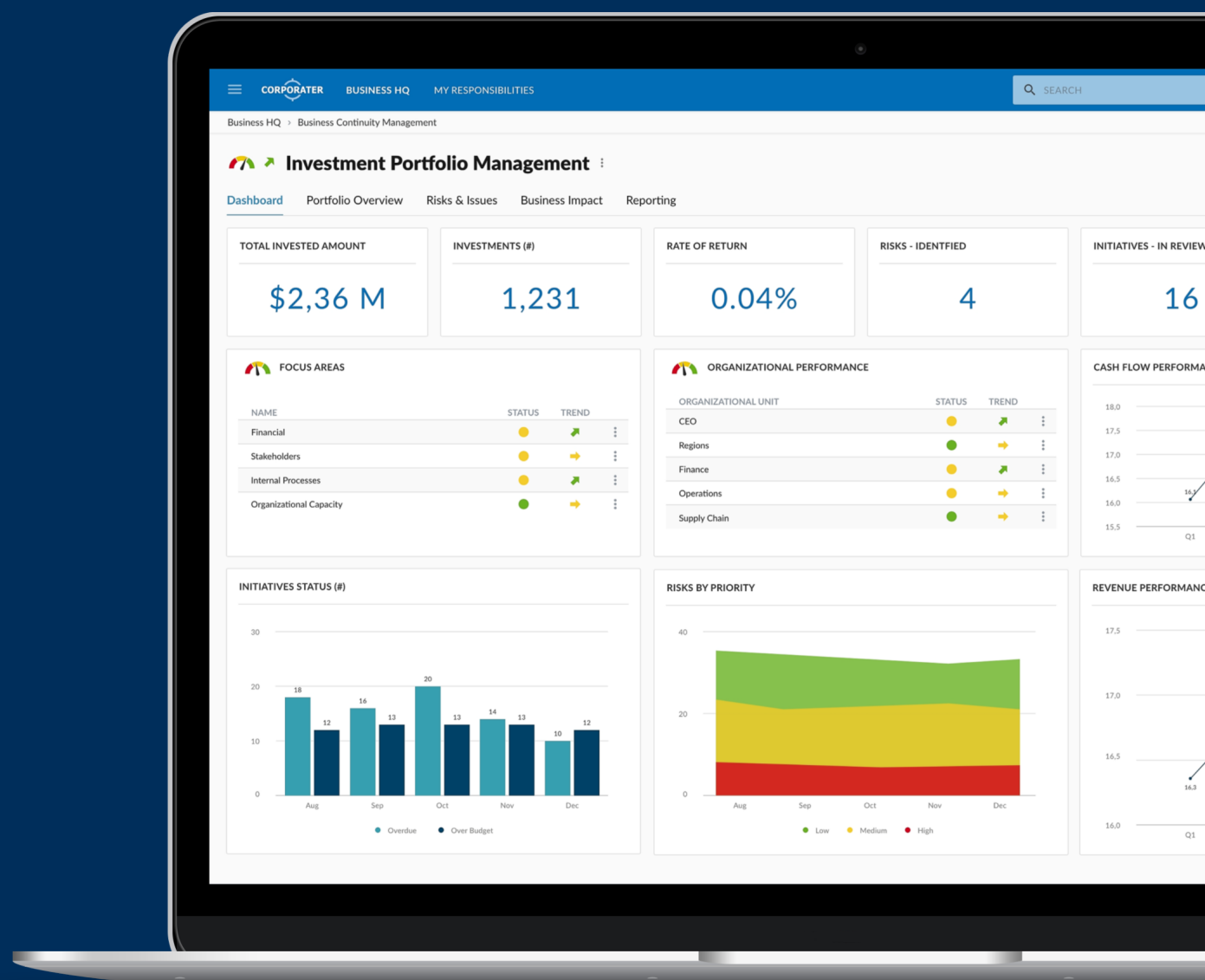
Investment Portfolio Management

Manage performance of your investment portfolios, minimize risk, streamline internal processes, improve operations, and make better-informed investment decisions.

Corporater Investment Portfolio Management software is a digital tool that enables organizations to manage, monitor, track, and optimize their investments. The solution provides organizations with a centralized view of their investments and the investments' performance. It is best suited for asset management companies, private equity firms, venture capital firms, hedge funds, and other investment professionals. Users may monitor portfolio performance on custom dashboards, track investments, conduct investment portfolio analysis, manage investment risk, generate reports, and more.

Solution Highlights

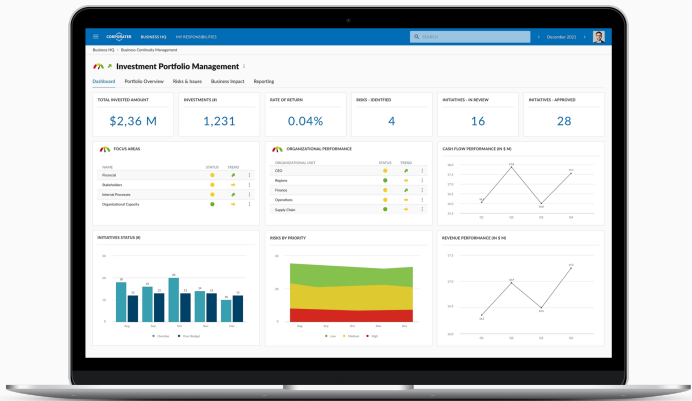
- Have a complete overview of your investment portfolio performance
- Configure custom dashboards to see metrics that matter to you — group your investments by asset class, security type, and other criteria
- Create custom views to see your portfolio breakdown by industry and geography
- Optimize your investment strategies based on your risk tolerance.
- Generate all-encompassing investment portfolio performance reports for your executive team, investors, and other key stakeholders



Solution Benefits & Functionalities

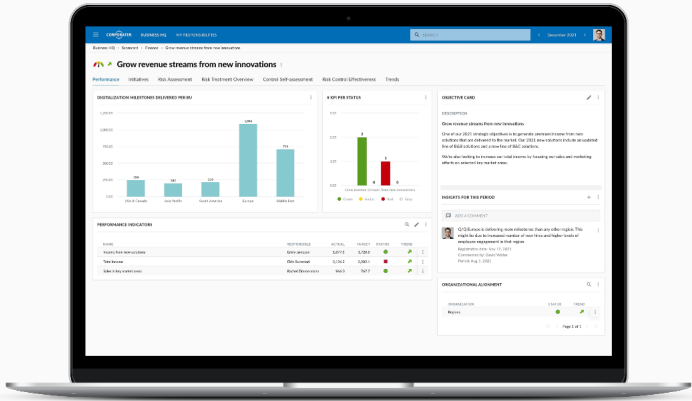
Corporater Investment Portfolio Management software can be used as a point solution or in combination with other Corporater and third-party solutions. Built on Corporater Business Management Platform, the solution can be seamlessly extended to other business management areas such as compliance management, enterprise risk management, corporate performance management, strategy management, board management, or internal audit management, all within the same system.

Built with a modern, intuitive user interface and a comprehensive set of business management features, Corporater makes it easy for users to quickly access the information they need, complete tasks, manage initiatives, and generate reports.



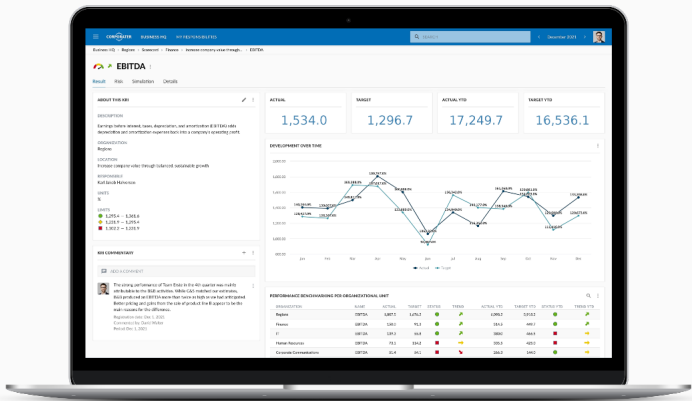
See the performance of your investment portfolio at a glance

Have a complete picture of your investment portfolio performance on Corporater investment portfolio dashboards. See a top-level overview, display consolidated financial results, track progress of your initiatives, and drill down on your metrics. Group your investments by asset class, security type, and other criteria for custom performance view. Continuously optimize your investment strategies based on your risk tolerance.



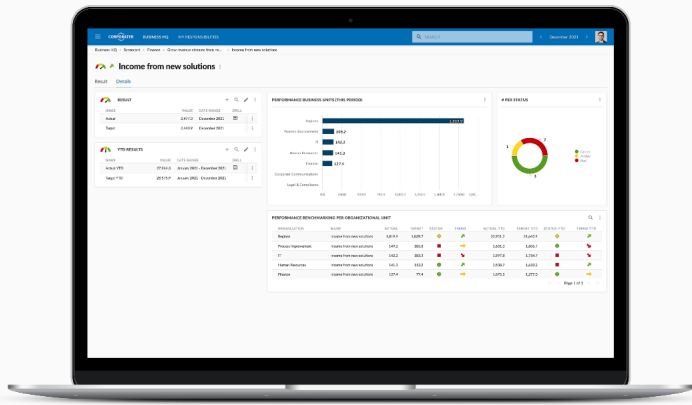
Configure custom dashboards

Avoid analysis paralysis. Choose to display only the data that is relevant to you, your team, your department, or your business unit. Create custom overviews of your investments and analyze your investments in accordance with specified criteria. See portfolio breakdown by industry and geography. With Corporater dashboards you may choose exactly which KPIs you want to see and how you would like them to be displayed. Choose from a wide range of data visualization options including charts, graphs, heat maps, and more.



Make intelligent investment decisions

Corporater enables organizations to add business context to their portfolio data, so that they could see the whole story and make intelligent investment decisions. See details (trend, status, assessments, and corresponding initiatives) behind each KPI in your portfolio, and understand the relationship between them. Connect your KPIs to your corporate strategy, conduct investment portfolio analysis, assess your risk tolerance, and use your data insights to optimize your investments.



Generate comprehensive investment portfolio reports


Eliminate the administrative burden of having to create reports from disparate spreadsheets. Corporater enables your teams to input data, information, and comments directly into the system, so you could generate all-encompassing investment portfolio performance reports for your executive team, investors, and other stakeholders. Include executive summary, data visualizations, and important portfolio updates. Add information about key parameters, financial results, investment expectations, investment structure and capitalization, recent events, valuation methodology, and risk assessment results.



Corporater Investment Portfolio Management solution is designed with an intuitive user interface making it easy for users to quickly access the information they need, complete tasks, collaborate, and generate reports.


Solution Key Capabilities

Corporater Investment Portfolio Management software comes pre-configured with industry best practice frameworks, templates, and functionalities needed for an effective management of investment portfolios.




Custom Dashboards

Go beyond traditional dashboards. Configure custom business dashboards to display relevant information, KPIs, and other metrics. No coding needed.




BI & Analytics

Connect, collect, organize, visualize, and analyze your data in business context to uncover actionable insights and make smarter, data-driven decisions.




Powerful Reports

Generate comprehensive reports in a variety of popular formats, including Word, Excel, PPT, and PDF. Include data visualizations directly from the system.




Alerts & Notifications

Create custom alerts to notify key stakeholders when a KPI moves above a specified threshold, when a goal is reached, or when a new issue arises.




Meeting Management

Set up meeting invites, create agendas, tag projects to be reviewed, add notes and attachments, and send out meeting invites to attendees.




Flexible Configuration

Create a digital twin of your organization. Corporater features an agile, flexible configuration environment managed directly by end users.




Data Visualization

Visualize your data story with custom-colored charts, graphs, risk heat maps, strategy maps, and more. Add your brand colors and design elements.




Business Framework Support

Establish, visualize, and align goals, objectives, and thresholds across the organization according to well-known business frameworks.




Automated Workflows

Automate your business processes and workflows to streamline operations, increase accountability, and ensure adherence to your procedures.




Data Integration

Have a single source of truth. Corporater comes with a powerful data integration engine built to integrate large amounts of data from a wide range of sources.



Access Control

Assign custom user access based on user role and control user permissions to manage content visibility and access to specific dashboards and features.



Single Sign-on (SSO)

Securely authenticate users with single sign-on (SSO). SSO allows users to log in with a single set of credentials across multiple platforms.

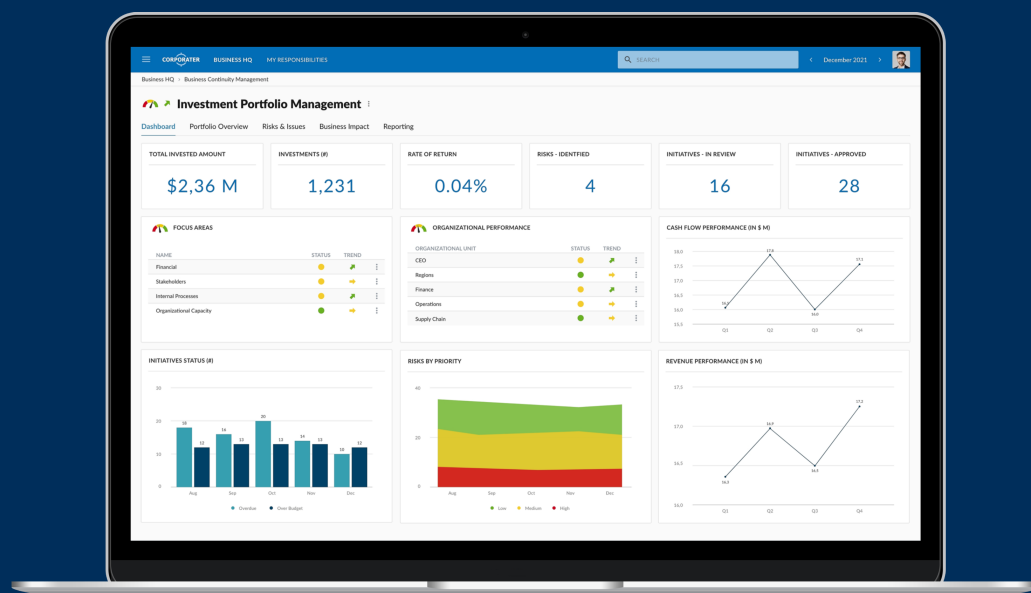
Learn more about Corporater key capabilities at www.corporater.com/key-capabilities.



Solution Features

- Intuitive user interface
- Interactive dashboards
- Investment portfolio analysis
- Performance reporting
- Workflow management
- Process automation
- Corporate KPIs
- Key financial results
- Benchmarking
- Scorecards
- Forecasting
- Budgeting
- Strategic initiatives
- Project plans
- Risk management
- Risk assessment
- Portfolio modeling
- Business framework support
- Automated workflows
- Consolidated balance sheets of your portfolio
- Data integration (automated and manual data input)
- Easy data integration via Excel upload
- Third-party data integration
- Benchmarking with external data
- Integration of performance with GRC
- Meeting management support
- Roles and responsibilities
- Document management
- Version control
- Audit log
- Alerts and notifications
- Customizable branding
- Access control / permissions
- SSO

Corporater Quick Facts



- ✓ Flexible configuration
- ✓ Rapid implementation
- ✓ Industry-leading security
- ✓ SaaS, on premise, or private cloud deployment
- ✓ Ongoing support and innovation

Why top organizations choose Corporater



Trusted & Proven Technology

Corporater has been delivering business management solutions since 2000.



Flexible Configuration

Have it your way! Create a solution that fits your specific business requirements.



Rapid Implementation

Get up and running in weeks, not months, with Corporater ready-to-go accelerators.



Powerful Data Integration

Integrate data from various sources to have a complete overview of your business.



Recognized by Top Industry Analysts

Corporater is recognized by top industry analysts including Gartner.



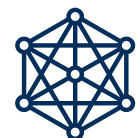
Industry-leading Security

Corporater is VL5 Veracode Verified and offers the highest level of security for your data.



Deployment of Your Choice

Select deployment option that fits your needs – SaaS, on premise, or private cloud.



Unlimited Scalability

Scale as your needs evolve. Run your operations efficiently as a connected enterprise.



World-class Customer Support

We are here for you with premium customer support and continuous innovation.



Corporater is a global software company that enables medium and large organizations worldwide to manage their business with integrated solutions for governance, performance, risk, and compliance built on a single platform.

We use our gains to make social impact.

www.corporater.com

